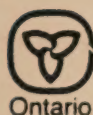
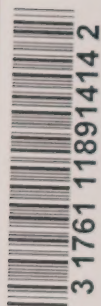


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Ministry of  
Colleges and  
Universities

Hon. Bette Stephenson, M.D., Minister  
Harry K. Fisher, Deputy Minister

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## Provincial Competency Guideline

# Retail Management

This document was developed in cooperation with  
Industry Representatives, and Heads of Business in the  
Colleges of Applied Arts and Technology.

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PROVINCIAL COMPETENCY GUIDELINE

RETAIL MANAGEMENT

B82-52929

Ministry of Colleges and Universities


Hon. Bette Stephenson, M. D., Minister

Dr. H. K. Fisher, Deputy Minister

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with Industry Representatives and Heads of Business  
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## INTRODUCTION

A few years ago, the Ministry of Colleges and Universities in cooperation with the Colleges of Applied Arts and Technology commenced the Competency Statement Project. The intent of the project is to identify skills required by practitioners to perform their duties. These skills will be reviewed and updated on the recommendation of the colleges and the Ministry.

Competencies are observable behaviours (tasks and/or skills) or sets of behaviours. A Competency Statement Chart is a graphic representation of the competencies in an occupation. Charts are produced by industry representatives working in the occupation, who were recommended by industry associations, employers and colleges. They are selected on the basis of their work environment and geographic location to provide input from a broad base. The occupational analysis (indecore) approach to chart development is used.

The competency Statement Chart indicates, by the use of an action verb, a level for each Task/Skill considered to be adequate. Individual colleges are encouraged to exceed this level to meet local industry needs as perceived by the faculty, advisory committee, and administration of each program.

The general education component of the program is not fully specified in the Competency Statement Chart. Colleges will select additional courses that will be supportive to the acquisition of the task and/or skill and comply with Ministry guidelines.

By utilizing the Competency Statement Chart, colleges will offer a program created from an industry developed core (INDECORE) that will be common for all colleges and still retain their uniqueness by exceeding suggested levels in the occupational skills and the selection of general education courses.



### PROGRAM INFORMATION

#### 1. Program Description

The purpose of the Retail Management Program is to prepare students to enter the field of retailing in a wide variety of job-entry occupations and, with experience, move upward into management levels. The Retail Management Program is the equivalent of two academic years in duration. During this period, students are introduced to both theory and practice and strong emphasis is placed on practical application achieved through work experience.

#### 2. Entrance Requirements

Job entry positions include:

- Retail Sales Clerk
- Stockroom Clerk
- Advertising Assistant
- Management Trainee

#### 3. Employment Opportunities

Career fulfillment occupations include:

- Assistant Store Manager
- Store Manager
- Area Manager
- Store Owner
- Buyer



GENERAL PERFORMANCE OBJECTIVES

1. To provide the student with the specialized skills and knowledge required to function at a job entry position in a retail operation.
2. To equip the student with the skills required for supervisory and management positions in retailing after work experience.



### PROGRAM COMPONENTS

The program curriculum consists of three components: occupational skills, general education and field placement.

a) Occupational Skills

These skills are stated in Appendix I and are shown graphically in Appendix IV. At the end of the programme the students should have mastered all the skills at a performance level considered, by the college, to be adequate for employers' needs.

b) General Education

In addition to the occupational skills courses, students will participate in general education courses (electives) in accordance with ministry guidelines on general education.

c) Field Placement

A period will be provided in the program when students will obtain practical experience in the business world.



Appendix I

RETAIL MANAGEMENT



Competency Area: General Management

<u>Reference Number</u>	<u>Task/Skill</u>	<u>Performance Level</u>
1.01	Communicate	
1.02	Provide Counselling	
1.03	Manage Time	
1.04	Delegate	
1.05	Provide Leadership	
1.06	Create Environment for Motivation	
1.07	Identify Management Styles	
1.08		
1.09	Set Objectives to Optimize Company Goals	
1.10	Establish Criteria	
1.11	Develop Plans	
1.12	Implement Plans	
1.13	Measure Results	
1.14	Take Corrective Action	
1.15		
1.16	Identify and Analyze Problem	
1.17	Gather Facts Regarding Problem	
1.18	Determine Various Solutions	
1.19	Select Appropriate Solution	
1.20		

Competency Area: General Management

<u>Reference Number</u>	<u>Task/Skill</u>	<u>Performance Level</u>
1.21	Determine Organizational Structure	
1.22	Determine Responsibilities and Lines of Reporting	
1.23	Make Decisions in Area of Responsibility/Authority	
1.24		
1.25	Assign Tasks in Relation to Personal Capabilities	
1.26		
1.27	Manage Change	
1.28		
1.29	Conduct Self-evaluation	

Competency Area: Merchandising

<u>Reference Number</u>	<u>Task/Skill</u>	<u>Performance Level</u>
2.01	Determine and Plan from Customer's Point of View	
2.02	Provide Input to Plan Product Mix Assortment - Depth, Season	
2.03	Plan Price and Profit	
2.04	Measure the Effect of Markups and Markdowns	
2.05	Calculate and Use Gross Margin and Gross Profit	
2.06	Prepare a Forecast of Total Gross Margin and Sales by Product	
2.07		
2.08	Plan Overall Displays	
2.09	Arrange Displays for Seasonal Items	
2.10	Arrange Displays to Accentuate Fashion	
2.11	Arrange Displays to Create Demand	
2.12	Arrange Displays to Create Desired Image	
2.13	Display to Create Traffic Paths	
2.14	Display in Accordance with Sales Per Foot Performance	
2.15	Display to Maximize Stock Turnover	
2.16	Develop Island/End Displays	
2.17	Create Window Displays	
2.18	Display to Define Service Levels	

Competency Area: Merchandising

<u>Reference Number</u>	<u>Task/Skill</u>	<u>Performance Level</u>
2.19	Arrange Displays According to Consumer Need	
2.20	Arrange Displays for Profit	
2.21	Arrange Displays for Traffic	
2.22	Allocate Shelf Position and Space	
2.23		
2.24	Identify Point of Purchase Fixtures	
2.25	Identify the Point of Purchase Information Requirements	
2.26	Use the Appropriate Point of Purchase Media to Communicate with Customer	
2.27	Locate Sources of Point of Purchase Expertise	
2.28		
2.29	Utilize Effect of Colour, Music, Touch, Smell	
2.30	Determine Level of Service Required for Product	

Competency Area: Store Operations

<u>Reference Number</u>	<u>Task/Skill</u>	<u>Performance Level</u>
3.01	Determine Sales per Man-hour	
3.02	Determine Mix of Full-time and Part-time	
3.03	Prepare Labour Schedule	
3.04	Forecast and Prepare Payroll Budget	
3.05	Conduct Staff Meeting/Briefing	
3.06	Develop and Utilize Store Inspection Report	
3.07	Follow Sanitation Regulations	
3.08	Maintain Physical Plant	
3.09	Maintain Exterior Property	
3.10	Budget and Control Fixed and Variable Costs	
3.11	Monitor Inventory Turnover	
3.12	Develop and Maintain Safety and Fire Prevention Program	
3.13	Develop and Maintain House Keeping Program	
3.14	Develop and Maintain Price Change Procedure	
3.15	Develop and Administer Receiving Procedures/Quality Control	
3.16		
3.17	Identify Various Methods to Determine Productivity i.e. Space - Product - Employee	
3.18	Follow Stock Rotation Policy - Perishable Codes	

Competency Area: Store Operations

<u>Reference Number</u>	<u>Task/Skill</u>	<u>Performance Level</u>
3.19		
3.20	Advise Customers of Technological and Other Changes That Will Affect Them	
3.21	Develop Customer Relations Policy Manual	
3.22	Develop Company Policy on Customer Complaints	
3.23	Handle Complaints in Accordance with policy	
3.24		
3.25	Develop a Cashier's Manual Covering Point of Sale Cash Handling	
3.26	Co-Ordinate Delivery Services	
3.27	Co-Ordinate Communications Services - i.e. Phones	
3.28	Plan and Purchase Supplies - i.e. Bags	
3.29	Identify Efficiency Savings	
3.30	Examine the Competition	

Competency Area: Selling

<u>Reference Number</u>	<u>Task/Skill</u>	<u>Performance Level</u>
4.01	Recognize the Role and Value of Customer	
4.02	Recognize Entry of Customer	
4.03	Organize the Selling Procedure - Type of Service	
4.04	Question Customer to Determine Needs i.e. What?	
4.05	Identify Customer Needs	
4.06	Take the Customer to the Product	
4.07	Present Solution to Needs	
4.08	Talk Product Benefits Not Features	
4.09	Motivate Customer to Purchase	
4.10	Ensure Customer's Needs are Fulfilled	
4.11	Adapt to Consumer Behaviour	
4.12	Promote Benefits of Most Profitable Items	
4.13	Display Empathy	
4.14	Display a Positive Attitude to Customer	
4.15	Display to Appeal to Senses	
4.16	Display and Demonstrate Product	
4.17	Treat Merchandise with Respect	
4.18	Present Add-On Items	
4.19	Apply Company Credit Policy	

Competency Area: Selling

<u>Reference</u> <u>Number</u>	<u>Task/Skill</u>	<u>Performance</u> <u>Level</u>
4.20	Close the Sale	
4.21		
4.22	Provide Post Sales Support	
4.23	Encourage Future Business	
4.24	Follow Procedures for Bagging and Wrapping Items	
4.25		
4.26	Maintain Record of Clients as Future Prospects	
4.27		
4.28	Re-Direct Customer Returns Into Sales	
4.29	Recognize Trends and Legal Implications of Consumerism	
4.30		
4.31	Present Company Image in Appearance	

Competency Area: Market Analysis

<u>Reference Number</u>	<u>Task/Skill</u>	<u>Performance Level</u>
5.01	Identify the Appropriate Demographics to be Researched	
5.02	Identify Various Methods of Conducting Market Research	
5.03	Conduct Research to Determine Demographics of the Market Area	
5.04	Use Government Research Material	
5.05	Identify and Analyze Competitor's Merchandising Approach	
5.06	Recognize Trends in Demographics and Lifestyles	
5.07	Recognize Trends in Local Economic Conditions	
5.08	Recognize Signs of Market Saturation	
5.09	Analyze and Draw Conclusions from Research Data	
5.10		
5.11	Use Results to Forecast Sales	
5.12	Use Results to Determine Image	
5.13	Use Results to Determine Decor	
5.14	Use Results to Determine Pricing Structure	
5.15	Use Results to Determine Products to be Promoted	
5.16	Use Results to Determine Advertising Plan	
5.17	Use Results to Determine Promotion Methods	

Competency Area: Market Analysis

<u>Reference Number</u>	<u>Task/Skill</u>	<u>Performance Level</u>
5.18	Use Results to Determine Level of Service	
5.19	Use Results to Determine Merchandising Strategy	
5.20	Use Results to Determine Staff Requirements	
5.21	Use Results to Determine Customer Services Required	
5.22	Use Results to Determine Product Mix	
5.23		
5.24	Use Sales Forecast to Determine Store Size	
5.25		
5.26	Use Sales Analysis for Additional Information on Product Mix	
5.27		
5.28	Conduct Customer Survey	

Competency Area: Location Appraisal

<u>Reference Number</u>	<u>Task/Skill</u>	<u>Performance Level</u>
6.01	Apply Market Analysis Information	
6.02	Identify Different Methods of Conducting a Traffic Analysis	
6.03	Identify Different Methods of Access to Store - Present and Future (Expressways, etc.)	
6.04	Identify Shopping Area Served	
6.05	Identify Local Zoning Regulations	
6.06	Identify Main Hours and Days of Business	
6.07	Identify Other Stores and Services in the Area - (Size, Age, etc.)	
6.08	Identify Population Densities Within Specific Distances	
6.09	Determine Available Parking	
6.10	Identify Other Government Regulations Affecting Site	
6.11	Obtain Information on Area Developments that will Change Existing Traffic Patterns	
6.12	Determine Availability of Employees	
6.13	Determine Facilities and Regulations Regarding Access by Suppliers	
6.14		
6.15	Identify Leasing Alternatives	
6.16	Relate Cost of Land to Profit Potential	
6.17	Identify Operating Costs in the Area	

Competency Area: Location Appraisal

<u>Reference Number</u>	<u>Task/Skill</u>	<u>Performance Level</u>
6.18	Identify Return on Capital	
6.19	Evaluate Free-Standing versus Shopping Centre Locations	
6.20	Recognize All Cost Implications of Shopping Centre Location	
6.21	Identify Responsibility for Leasehold Improvements	
6.22		
6.23	Obtain Legal Advice on Leases	
6.24		
6.25	Prepare One and Three Year Profit Forecast	

Competency Area: Security

<u>Reference Number</u>	<u>Task/Skill</u>	<u>Performance Level</u>
7.01	Recognize Forms of Shoplifting	
7.02	Contact Local Police for Information on Apprehension	
7.03	Develop Procedures to Apprehend Shoplifters	
7.04	Develop Procedures and Guidelines for Interrogation	
7.05	Follow Company Procedures for Shoplifting	
7.06	Develop a Report Form for Shoplifting	
7.07	Identify Physical Plant Limitations and Problem Areas	
7.08	Provide Input to Layout to Minimize Shoplifting	
7.09	Apply Packaging Methods to Prevent Shoplifting	
7.10	Identify Shrinkage Areas for Extra Surveillance	
7.11	Develop Store Closing Routine	
7.12	Develop Procedures for Handling of Returns	
7.13	Develop Armed Robbery Policy and Procedures	
7.14	Use Physical Alarm and Detection Devices	
7.15		
7.16	Obtain Legal Advice	
7.17		
7.18	Develop Cash Register Procedures	
7.19	Develop Cash Handling Policies, Procedures and Control	

Competency Area: Security

<u>Reference Number</u>	<u>Task/Skill</u>	<u>Performance Level</u>
7.20	Develop Cheque Cashing and Authorizing Procedures	
7.21		
7.22	Recognize Common Methods of Employee Pilfering	
7.23	Develop Policy for Employee Purchases	
7.24	Develop Policy for Employees' Personal Belongings	
7.25	Develop Policy Regarding On-Premise Consumption	
7.26		
7.27	Provide Input to Internal Audit Procedures	
7.28		
7.29	Develop Procedures for Physical Emergencies	
7.30	Monitor Receiving Procedures	
7.31	Develop Ticketing Procedures for Price Marking	
7.32	Develop Security Check List	

Competency Area: Advertising & Promotion

<u>Reference Number</u>	<u>Task/Skill</u>	<u>Performance Level</u>
8.01	Determine Advertising Objectives	
8.02	Formulate Comprehensive Advertising/Promotional Plan and Budget	
8.03	Differentiate: Institutional vs. Product vs. Price Advertising	
8.04	Identify Different Media: Car Cards, Direct Mail, Radio, Newspaper, Television, Billboards, Outdoor, Magazines	
8.05	Recognize Features and Characteristics of Various Media and Audience	
8.06	Select Most Effective Advertising Media	
8.07	Develop and Adhere to Company Code of Ethics	
8.08	Conform to Government Regulations in Advertising	
8.09		
8.10	Recognize Effective Layout, Copy and Artwork	
8.11	Recognize Mechanics of Preparing Copy	
8.12	Explain Composition and Mechanics of Time Advertising	
8.13	Utilize the Basic Psychology of Advertising	
8.14	Recognize Need for Flexibility and Adjustability to Unusual Conditions	
8.15	Recognize Opportunities: Support of Community Activities	
8.16		

Competency Area: Advertising & Promotion

<u>Reference Number</u>	<u>Task/Skill</u>	<u>Performance Level</u>
8.17	Measure Effectiveness of Advertising	
8.18	Evaluate the Use of Advertising Display and Promotional Allowances	
8.19		
8.20	Communicate Advertising Plans and Schedules to Employees	
8.21	Support Merchandising and Sales Plan in Advertising Plan	
8.22	Merchandise the Advertising	
8.23	Utilize Co-Operative Advertising	
8.24		
8.25	Develop Promotion Calendar	
8.26	Utilize Bag Stuffers, Signs, Banners, Couponing, Other Point of Purchase Item Demonstrations, Gift Items, Stuffers, Window Signs	
8.27	Identify Techniques of Production and Sources of Supply of Promotional Items	
8.28	Maintain Record of Results of Special Promotions	
8.29	Utilize Special Events	
8.30		
8.31	Recognize Problems and Advantages of Catalogue Merchandising	
8.32	Evaluate the Cost Effectiveness of Loss Leaders	

Competency Area: Product Knowledge

<u>Reference Number</u>	<u>Task/Skill</u>	<u>Performance Level</u>
9.01	Identify Prime Seasonal Sales Times	
9.02	Identify Best Seller in Product Category	
9.03	Identify Movement of All Products in Category	
9.04	Identify Guarantees and Warranties - Manufacturer/Retailer	
9.05	Identify Benefits and Features of Product	
9.06	Identify Maintenance and Service Requirements	
9.07	Identify In Stock or Availability	
9.08	Evaluate Additional Charges	
9.09	Evaluate Durability of Product	
9.10	Specify Special Requirements - License - Power - Supply	
9.11	Recognize and Explain Use of Product	
9.12	Recognize Product Limitations	

Competency Area: Buying

<u>Reference</u> <u>Number</u>	<u>Task/Skill</u>	<u>Performance</u> <u>Level</u>
10.01	Establish a Buying Plan Based on Market Analysis	
10.02	Establish a Buying Budget	
10.03	Buy to Meet Customer Needs	
10.04	Establish Optimum Number of Stock Keeping Units	
10.05	Develop a Basic Stock Plan	
10.06	Buy to Maximize Gross Margin Return on Investment	
10.07	Buy for Promotional Package	
10.08	Establish Optimum Number of Price Points	
10.09	Buy in Most Advantageous Quantities	
10.10	Negotiate Best Purchase Price	
10.11	Identify and Negotiate Terms of Purchase and Services of Supplier	
10.12	Determine Cost of Owning Inventory	
10.13	Generalize from Data the Cost of Producing Product	
10.14	Calculate Net Landed Costs	
10.15	Evaluate Direct Buying versus Indirect Buying	
10.16	Prepare Vital Buying Information Record for Re-Buying	
10.17	Evaluate Market Conditions at Source of Supply	
10.18	Keep Abreast of Product Developments and Market Trends	

Competency Area: Buying

<u>Reference Number</u>	<u>Task/Skill</u>	<u>Performance Level</u>
10.19	Identify Reliable Sources of Supply	
10.20	Develop Source Relationships	
10.21	Identify Products Compatible with Company Resources	
10.22	Develop Specifications and Buy to Them	
10.23	Use Independent Testing Laboratory	
10.24	Use Sampling and/or Product Testing	
10.25	Use Buying Committees (Internal)	
10.26	Use Private Labels	
10.27	Use Buying and Shipping Groups (External)	
10.28	Select Best Routing and Tariff Arrangement	
10.29	Identify Adequate Facilities to Store Delivered Merchandise	
10.30	Identify Various Means of Payment	
10.31	Buy Under Government Quota Restrictions	
10.32	Develop Sell-Through Strategy	
10.33	Develop a Buying Code of Ethics	

Competency Area: Inventory Control

<u>Reference Number</u>	<u>Task/Skill</u>	<u>Performance Level</u>
11.01	Establish Desired Stock Turns	
11.02	Set Stock Levels	
11.03	Develop Ordering Procedure	
11.04	Order to Maximize Profit	
11.05	Recognize Most Economic Ordering Quantities	
11.06	Utilize Computer Inventory Control Systems	
11.07	Use Manual Inventory Control Systems	
11.08	Monitor Stock Turns	
11.09	Monitor and Identify and Eliminate Slow Moving Items	
11.10	Maintain Periodic Inventory Counts	
11.11		
11.12	Recognize Pitfalls of Overage or Shortage of Inventory	
11.13	Adjust Inventory Evaluations by Taking Markups - Markdowns	
11.14	Know When to Take Markdown	
11.15		
11.16	Follow First In - First Out Inventory Control System	
11.17		
11.18	Take Physical Inventory	

Competency Area: Distribution

<u>Reference</u> <u>Number</u>	<u>Task/Skill</u>	<u>Performance</u> <u>Level</u>
12.01	Recognize Availability and Cost Effectiveness of Drop vs. Central Shipment	
12.02	Evaluate Effectiveness of Centralizing and Decentralizing of Warehousing	
12.03		
12.04	Recognize and Utilize Various Warehousing Systems	
12.05	Identify Most Effective Methods of Materials Handling	
12.06	Identify Individual Product Requirements for Warehousing	
12.07		
12.08	Recognize the Advantages and Disadvantages of Pricing Warehouse Stocks	
12.09	Establish Time Standards for Handling Merchandise	
12.10		
12.11	Identify Traffic Systems	
12.12	Eliminate Vehicle Dead-Heads	
12.13	Identify Most Effective Method of Shipment	
12.14	Establish Communication and Documentation for Store to Store Shipment	
12.15		
12.16	Recognize Effect of Packaging on Shipping Costs	
12.17		
12.18	Identify Different Pricing and Measurement Systems for Products	

Competency Area: Accounting & Financial Management

<u>Reference Number</u>	<u>Task/Skill</u>	<u>Performance Level</u>
13.01	Read a Balance Sheet	
13.02	Prepare an Operating Budget	
13.03	Prepare a Cash Flow Statement	
13.04	Utilize Information from Forecast of Sales & Profits	
13.05	Identify Gross and Net Profit	
13.06		
13.07	Monitor Budget and Cash Flow Statement	
13.08	Identify Short Falls and Take Corrective Action	
13.09	Measure Effects of Markups and Markdowns	
13.10		
13.11	Prepare Forecast of Return on Investment	
13.12	Determine Amount of Capital Required	
13.13	Determine Sources of Funds (Long-Range)	
13.14	Determine Cost of Borrowed Money vs. Equity	
13.15		
13.16	Evaluate Effects on Personal Finances	
13.17	Evaluate Proprietorship vs. Partnership vs. Incorporation	
13.18		
13.19	Develop a Case and Presentation for Funding	
13.20		

Competency Area: Accounting & Financial Management

<u>Reference</u> <u>Number</u>	<u>Task/Skill</u>	<u>Performance</u> <u>Level</u>
13.21	Set Up a Simple Set of Books	
13.22	Determine Services Available from Accountant	
13.23		
13.24	Determine Cost of Goods Sold	
13.25	Maintain Record of Expenses	
13.26	Develop and Maintain Petty Cash Records	
13.27		
13.28	Develop a Credit Sales Program	
13.29	Develop a Company Collection Policy	
13.30	Identify the Advantages and Disadvantages of Granting Credit	

Competency Area: Personnel Administration

<u>Reference Number</u>	<u>Task/Skill</u>	<u>Performance Level</u>
14.01	Identify Company Personnel Needs	
14.02	Forecast and Plan for Manpower Needs	
14.03	Recognize the Need For and Develop Personnel Policies and Procedures	
14.04	Develop Hiring Documentation	
14.05		
14.06	Write Job Description	
14.07	Identify Qualifications Required	
14.08	Identify Sources	
14.09	Recruit	
14.10	Interview	
14.11	Select	
14.12		
14.13	Determine Remuneration	
14.14	Conduct Induction and Orientation	
14.15	Identify Role and Nature of Benefits	
14.16	Provide Means of Specific Job Training	
14.17	Develop Future Training Requirements and Career Paths	
14.18	Identify Employee's Personal Objectives and Potential	
14.19	Identify Performance Standards	
14.20	Monitor On-Going Employee Performance	

Competency Area: Personnel Administration

<u>Reference Number</u>	<u>Task/Skill</u>	<u>Performance Level</u>
14.21	Carry Out Performance Evaluation	
14.22	Analyze Performance Problems	
14.23	Take Action - Discipline and Counsel	
14.24	Administer Discipline Policy	
14.25		
14.26	Develop Wage Administration Procedures	
14.27	Work Within Labour and Human Rights Legislation	
14.28	Work Within a Labour Agreement	
14.29	Develop and Maintain Employee Records/Files	
14.30		
14.31	Conduct Termination Interview	

Competency Area: Communications

<u>Reference Number</u>	<u>Task/Skill</u>	<u>Performance Level</u>
15.01	Listen	
15.02		
15.03	Display Command of the Language	
15.04		
15.05	Give and Receive Constructive Criticism	
15.06	Give and Receive Feedback	
15.07	Use Tact and Diplomacy	
15.08		
15.09	Read and Use Body Language	
15.10		
15.11	Communicate Verbally With One Person	
15.12		
15.13	Use Telephone Techniques	
15.14		
15.15	Organize and Conduct a Meeting	
15.16	Conduct Group Presentations	
15.17	Develop Presentation Materials	
15.18	Use Audio-Visual Techniques	
15.19		
15.20	Give and Receive Instruction	

Competency Area: Communications

<u>Reference Number</u>	<u>Task/Skill</u>	<u>Performance Level</u>
15.21		
15.22	Speak Publicly	
15.23		
15.24	Prepare Precise Reports	
15.25	Write Precise Business Letters	
15.26	Write Business Memos	
15.27	Follow-up on Requests and Memos	
15.28	Write Procedures	
15.29		
15.30	Identify Current Developments in Electronic Communication	
15.31		
15.32	Display Effective Reading Techniques	

Competency Area: Law

<u>Reference</u> <u>Number</u>	<u>Task/Skill</u>	<u>Performance</u> <u>Level</u>
16.01	Explain Canadian Legal System	
16.02	Explain Court System	
16.03	Explain Civil Procedure System	
16.04		
16.05	Comply with Law of Torts	
16.06	Explain Standard of Care	
16.07	Comply with Libel and Slander Legislation	
16.08	Explain Natural Justice	
16.09		
16.10	Comply with Law of Contract	
16.11	Comply with Warranties	
16.12		
16.13	Comply with Contract of Sale	
16.14		
16.15	Comply with Consumer Law	
16.16	Explain Combines Investigation	
16.17		
16.18	Comply with Employment Law	
16.19		

Competency Area: Law

<u>Reference Number</u>	<u>Task/Skill</u>	<u>Performance Level</u>
16.20	Comply with Insurance Law	
16.21		
16.22	Comply with Law of Agency	
16.23	Define Partnership	
16.24	Define Corporations	
16.25		
16.26	Define Debt-Creditor Rights	
16.27		
16.28	Identify Personal Property Security	
16.29		
16.30	Identify Real Property	

Competency Area: Data Processing

<u>Reference Number</u>	<u>Task/Skill</u>	<u>Performance Level</u>
17.01	Identify Computer Systems Components	
17.02		
17.03	Define Computer Systems Planning	
17.04		
17.05	Define Processing Cycle	
17.06		
17.07	Use Logical Operations	
17.08		
17.09	Use Flowcharting	
17.10		
17.11	Explain Batch Processing Operations	
17.12	Explain On-Line Operations	
17.13	Explain Micro Computer Operations	
17.14		
17.15	Code and Run a Program	
17.16		
17.17	Use Transaction Oriented Input	
17.18		
17.19	Explain Local and Remote Job Entry	
17.20		

Competency Area: Data Processing

<u>Reference Number</u>	<u>Task/Skill</u>	<u>Performance Level</u>
17.21	Read Output Reports	
17.22		
17.23	Identify File Organization	
17.24		
17.25	Explain File Access and Security	
17.26		
17.27	Explain Searching Techniques	
17.28		
17.29	Define Computer Systems Management	



Appendix II

Credits

RETAIL MANAGEMENT

INDUSTRY REPRESENTATIVES

The following committee selected on the basis of expertise and geographical location participated in the development of the competency chart.

<u>NAME</u>	<u>COMPANY</u>	<u>CITY</u>
Leon Bookman	Consultant	Toronto
Malcolm Coles	Eaton's	Toronto
Pat J. Doyle	Simpson's-Sears	Toronto
Keith Elliott	Woolco Dept. Stores Division of Woolworth's	Toronto
Ken Gibson	Canadian Tire	Toronto
Tony Grant	Woods Gordon	Toronto
Steve G. Nielsen	Canada Post Corporation	Toronto
Linda Sargent	Loblaws Ltd.	Toronto
E. Peter Tesar	Rothmans of Pall Mall Canada Ltd.	Toronto
Joe Varmuza	Bata Shoe Stores	Toronto



### Appendix III

#### Definition of Terms

The following definitions are provided to clarify certain terms used in this document. It is acknowledged that some of these may be interpreted differently in other contexts.

##### Competency Statements

A group of observable related skills in an occupation stated as performance objectives, reflecting the minimum acceptable skills in an occupation.

##### Competency Statement Chart

A graphic representation of competencies in an occupation. They are produced by practitioners working in the occupation and represent the tasks and skills performed in the practice/profession.

##### Curriculum

A series of courses of study concentrating on the skills/tasks of the competency statement chart, and designed to facilitate the student's acquisition of both theoretical and practical training requirements.



Appendix IV

RETAIL MANAGEMENT

COMPETENCY STATEMENT CHART

Ministry of Colleges and Universities

Hon. Bette Stephenson, M.D., Minister

Dr. H. K. Fisher, Deputy Minister

This document was developed in cooperation  
with Industry Representatives and Heads of Business  
in the Colleges of Applied Arts and Technology





General Management	Communicate	Provide Counseling	Manage Time	Delegate	Provide Leadership	Create Environment for Motivation	Identify Management Styles		Set Objectives to Optimize Company Goals	Establish Criteria	Develop Plans	Implement Plans	Measure Results	Take Corrective Action	Identify and Analyze Problem	Gather Facts Regarding Problem
1.00	1.01	1.02	1.03	1.04	1.05	1.06	1.07	1.08	1.09	1.10	1.11	1.12	1.13	1.14	1.15	1.16
Merchandising	Determine and Plan from Customer's Point of View	Provide Input to Plan Product Mix Assessment Depth Season	Plan Price and Profit	Measure the Effect of Markdowns and Markdowns	Calculate and Use Gross Margin and Gross Profit	Prepare a Forecast of Total Gross Margin and Sales by Product	Plan Overall Displays	Arrange Displays for Seasonal Items	Arrange Displays to Accommodate Fashion	Arrange Displays to Create Demand	Arrange Displays to Create Desired Image	Display to Create Traffic Peaks	Display in Accordance with Sales Per Foot Performance	Display to Maximize Stock Turnover	Develop Inland End Displays	Create Window Displays
2.00	2.01	2.02	2.03	2.04	2.05	2.06	2.07	2.08	2.09	2.10	2.11	2.12	2.13	2.14	2.15	2.16
Store Operations	Determine Sales per Man-hour	Determine Mix of Full-time and Part-time	Prepare Labour Schedule	Forecast and Prepare Payroll Budget	Conduct Staff Meeting Briefing	Check and Utilize Inspection Report	Follow Sanitation Regulations	Maintain Physical Plant	Maintain Exterior Property	Budget and Control Fixed and Variable Costs	Monitor Inventory Turnover	Develop and Maintain Safety and Fire Prevention Program	Develop and Maintain House Keeping Program	Develop and Maintain Price Change Procedure	Develop and Administer Receiving Procedures Quality Control	Identify Various Methods to Determine Productivity in a Space Product Employee
3.00	3.01	3.02	3.03	3.04	3.05	3.06	3.07	3.08	3.09	3.10	3.11	3.12	3.13	3.14	3.15	3.17
Selling	Recognize the Role and Value of Customer	Recognize Entry of Customer	Organize the Selling Procedure Type of Service	Question Customer to Determine Needs i.e. What?	Identify Customer Needs	Make the Customer Buy the Product	Present Solution to Needs	Task Product Benefits Not Features	Motivate Customer to Purchase	Ensure Customer's Needs are Fulfilled	Adapt to Consumer Behaviour	Promote Benefits of Most Profitable Items	Display Empathy	Display a Positive Attitude to Customer	Display to Appeal to Senses	Display and Demonstrate Product
4.00	4.01	4.02	4.03	4.04	4.05	4.06	4.07	4.08	4.09	4.10	4.11	4.12	4.13	4.14	4.15	4.16
Market Analysis	Identify the Appropriate Demographics to be Researched	Identify Various Methods of Conducting Market Research	Conduct Research to Determine Demographics of the Market Area	Use Government Research Material	Identify and Analyze Competitor's Merchandising Approach	Recognize Trends in Demographics and Lifestyles	Recognize Trends in Local Economic Conditions	Recognize Signs of Market Saturation	Analyze and Draw Conclusions from Research Data	Use Results to Forecast Sales	Use Results to Determine Image	Use Results to Determine Decor	Use Results to Determine Pricing Structure	Use Results to Determine Products to be Promoted	Use Results to Determine Advertising Plan	Use Results to Determine Promotion Methods
5.00	5.01	5.02	5.03	5.04	5.05	5.06	5.07	5.08	5.09	5.10	5.11	5.12	5.13	5.14	5.15	5.16
Location Appraisal	Apply Market Analysis Information	Identify Different Methods of Conducting a Traffic Analysis	Identify Different Methods of Access to Store Present and Future (Expressways etc.)	Identify Shopping Area Served	Identify Local Zoning Regulations	Identify Main Hours and Days of Business	Identify Other Stores and Services in the Area (Size Age etc.)	Identify Population Densities Within Specific Distances	Determine Available Parking	Identify Other Government Regulations Affecting Site	Obtain Information on Area Development that will Change Existing Traffic Patterns	Determine Feasibility of Employees	Determine Facilities and Regulations Regarding Access by Suppliers	Identify Leasing Alternatives	Re-use Cost of Land to Other Potential	Identify Operating Costs in the Area
6.00	6.01	6.02	6.03	6.04	6.05	6.06	6.07	6.08	6.09	6.10	6.11	6.12	6.13	6.14	6.15	6.16
Security	Recognize Forms of Shoplifting	Conduct Local Police for Information on Apprehension	Develop Procedures to Apprehend Shoplifters	Develop Procedures and guidelines for Interrogation	Follow Company Procedures for Shoplifting	Develop a Report Form to Shoplifting	Identify Physical Plant Limitations and Problem Areas	Provide Input to Layout to Minimize Shoplifting	Apply Packaging Methods to Prevent Shoplifting	Identify Shrinkage Areas for Extra Surveillance	Develop Store Closing Routine	Develop Procedures for Handling of Returns	Develop Armed Robbery Policy and Procedures	Use Physical Alarm and Detection Devices	Obtain Legal Advice	
7.00	7.01	7.02	7.03	7.04	7.05	7.06	7.07	7.08	7.09	7.10	7.11	7.12	7.13	7.14	7.15	7.16
Advertising & Promotion	Determine Advertising Objectives	Formulate Comprehensive Advertising Promotional Plan and Budget	Differentiate Institutional vs. Price Advertising	Identify Different Media Car Cards Direct Mail Radio Newspaper Television Billboards Magazines	Recognize Features and Characteristics of Various Media and Audience	Select Most Effective Advertising Media	Develop and Adhere to Company Code of Ethics	Conform to Government Regulations in Advertising	Recognize Effective Layout Copy and Artwork	Recognize Mechanics of Preparing Copy	Explain Composition and Mechanics of Time Advertising	Utilize the Basic Psychology of Advertising	Recognize Need for Flexibility and Adaptability to Unusual Conditions	Recognize Opportunities Support of Community Activities	Measure Effectiveness of Advertising	
8.00	8.01	8.02	8.03	8.04	8.05	8.06	8.07	8.08	8.09	8.10	8.11	8.12	8.13	8.14	8.15	8.16
Product Knowledge	Identify Prime Seasonal Sales Times	Identify Best Seller in Product Category	Identify Movement of All Products in Category	Identify Guarantees and Warranties Manufacturer/Reseller	Identify Benefits and Features of Product	Identify Maintenance and Service Requirements	Identify in Stock or Availability	Evaluate Additional Charges	Evaluate Durability of Product	Specify Special Requirements License Power Supply	Recognize and Explain Use of Product	Recognize Product Limitations				
9.00	9.01	9.02	9.03	9.04	9.05	9.06	9.07	9.08	9.09	9.10	9.11	9.12				
Buying	Establish a Buying Plan Based on Market Analysis	Establish a Buying Budget	Buy to Meet Customer Needs	Establish Optimum Number of Stock Keeping Units	Develop a Basic Stock Plan	Buy to Maximize Gross Margin Return on Investment	Buy for Promotional Package	Establish Optimum Number of Price Points	Buy in Most Advantageous Quantities	Negotiate Best Purchase Price	Identify and Negotiate Terms of Purchase and Services of Supplier	Determine Cost of Owning Inventory	Generate from Data the Cost of Producing Product	Calculate Net Landlord Costs	Evaluate Direct Buying vs Indirect Buying	Purchase Via Buying Information on Record for Rebuying
10.00	10.01	10.02	10.03	10.04	10.05	10.06	10.07	10.08	10.09	10.10	10.11	10.12	10.13	10.14	10.15	10.16
Inventory Control	Establish Desired Stock Turns	Set Stock Levels	Develop Ordering Procedure	Order to Maximize Profit	Recognize Most Effective Methods of Materials Handling	Utilize Computer Inventory Control Systems	Use Manual Inventory Control Systems	Monitor Stock Turns	Monitor and Identify and Eliminate Slow Moving Items	Maintain Periodic Inventory Counts	Recognize Perils of Overage or Shortage of Inventory	Actual Inventory Evaluations by Taking Margins Markdowns	Know When to Take Markdown	Follow First In First Out Inventory Control System		
11.00	11.01	11.02	11.03	11.04	11.05	11.06	11.07	11.08	11.09	11.10	11.11	11.12	11.13	11.14	11.15	11.16
Distribution	Recognize Availability and Cost Effectiveness of Distribution of Drop vs Central Shipment	Evaluate Effectiveness of Centralizing and Decentralizing of Warehousing	Recognize and Utilize Various Warehousing Systems	Identify Most Effective Methods of Materials Handling	Identify Individual Product Requirements for Warehousing	Recognize the Advantages and Disadvantages of Pricing Warehouse Stocks	Establish Time Standards for Handling Merchandise	Identify Traffic Systems	Eliminate Vehicle Dead-Heads	Identify Most Effective Method of Shipment	Establish Communication and Documentation for Store to Store Shipment	Recognize Effect of Packaging on Shipping Costs	Evaluate Effect on Personal Finances	Evaluate Proprietorship vs Partnership vs Incorporation	Develop Future Training Requirements and Career Paths	
12.00	12.01	12.02	12.03	12.04	12.05	12.06	12.07	12.08	12.09	12.10	12.11	12.12	12.13	12.14	12.15	12.16
Accounting & Financial Management	Fixed a Balance Sheet	Prepare an Operating Budget	Prepare a Cash Flow Statement	Utilize Information from Forecast of Sales & Profits	Identify Gross and Net Profit	Monitor Budget and Cash Flow Statement	Identify Short Falls and Take Corrective Action	Measure Effects of Markup and Markdowns	Prepare Forecast of Return on Investment	Determine Amount of Capital Required	Determine Sources of Funds (Long-Range)	Determine Cost of Borrowed Money vs Equity	Determine Cost of	Evaluate Effect on Personal Finances	Evaluate Proprietorship vs Partnership vs Incorporation	Develop Future Training Requirements and Career Paths
13.00	13.01	13.02	13.03	13.04	13.05	13.06	13.07	13.08	13.09	13.10	13.11	13.12	13.13	13.14	13.15	13.16
Personnel Administration	Identify Company Personnel Needs	Forecast and Plan for Manpower Needs	Recognize the need for and Develop Personnel Policies and Procedures	Develop Hiring Documentation	Write Job Description	Identify Qualifications Required	Identify Sources	Recruit	Interview	Select	Determine Remuneration	Conduct Induction and Orientation	Identify Role and Nature of Benefits	Provide Means of Specific Job Training	Develop Future Training Requirements and Career Paths	
14.00	14.01	14.02	14.03	14.04	14.05	14.06	14.07	14.08	14.09	14.10	14.11	14.12	14.13	14.14	14.15	14.16
Communications	Listen	Display Command of the Language	Give and Receive Constructive Criticism	Use Fact and Diplomacy	Read and Use Body Language	Communicate Verbally With One Person	Use Telephone Techniques	Organize and Conduct a Meeting	Conduct Group Presentations	Develop Presentation Materials						
15.00	15.01	15.02	15.03	15.04	15.05	15.06	15.07	15.08	15.09	15.10	15.11	15.12	15.13	15.14	15.15	15.16
Law	Explain Canadian Legal System	Explain Court System	Explain Civil Procedure System	Comply with Law of Torts	Explain Standard of Care	Comply with Label and Sale Standard Legislation	Explain Natural Justice of Law	Comply with Law of Contract	Comply with Warranties	Comply with Contract of Sale	Comply with Consumer Law	Comply with Consumer Law	Comply with Consumer Law	Comply with Consumer Law	Comply with Consumer Law	Comply with Consumer Law
16.00	16.01	16.02	16.03	16.04	16.05	16.06	16.07	16.08	16.09	16.10	16.11	16.12	16.13	16.14	16.15	16.16
Data Processing	Identify Computer Systems Components	Define Computer Systems Planning	Define Processing Cycle	Use Logical Operations	Use Flowcharting	Explain Batch Processing Operations	Explain On-Line Operations	Explain Micro Computer Operations	Code and Run a Program	Use Transaction Oriented Input						
17.00	17.01	17.02	17.03	17.04	17.05	17.06	17.07	17.08	17.09	17.10	17.11	17.12	17.13	17.14	17.15	17.16



General Management	Determine Various Solutions	Select Appropriate Solution	Determine Organizational Structure	Determine Responsibilities and Lines of Reporting	Make Decisions in Area of Responsibility Authority	Assign Tasks in Relation to Personal Capabilities	Manage Change	Conduct Self-Evaluation						
1.00	1.10	1.19	1.20		1.22	1.23	1.24	1.25	1.26	1.27	1.28	1.29		
Merchandising	Display to Define Service Levels	Arrange Displays According to Consumer Need	Arrange Displays for Profit	Arrange Displays for Traffic	Allocate Shelf Position and Space	Identify Point of Purchase Features	Identify the Point of Purchase Information Requirements	Use the Appropriate Point of Purchase Media to Communicate with Customer	Locate Sources of Point of Purchase Expertise		Utilize Effect of Colour, Music, Touch, Smell	Determine Level of Service Required for Product		
2.00	2.10	2.19	2.20	2.21	2.22	2.23	2.24	2.25	2.26	2.27	2.28	2.29	2.30	
Store Operations	Follow Stock Rotation Policy - Perishable Codes		Advise Customers of Technological and Other Changes That Will Affect Them	Develop Customer Relations Policy Manual	Develop Company Policy on Customer Complaints	Handle Complaints in Accordance with Policy	Develop a Cashier's Manual Covering Point of Sale Cash Handling	Co-Ordinate Delivery Services	Co-Ordinate Communications Services - i.e. Phones	Plan and Purchase Supplies - i.e. Bags	Identify Efficiency Savings	Examine the Competition		
3.00	3.10	3.19	3.20	3.21	3.22	3.23	3.24	3.25	3.26	3.27	3.28	3.29	3.30	
Staffing	Present Add-on Items	Apply Company Credit Policy	Close the Sale		Provide Post Sales Support	Encourage Future Business	Follow Procedures for Bagging and Wrapping Items	Maintain Record of Claims as Future Projects		Re-Direct Customer Returns into Sales	Recognize Trends and Legal Implications of Consumerism	Present Company Image in Appearance		
4.00	4.10	4.19	4.20	4.21	4.22	4.23	4.24	4.25	4.26	4.27	4.28	4.29	4.30	4.31
Market Analysis	Use Results to Determine Level of Service	Use Results to Determine Merchandising Strategy	Use Results to Determine Staff Requirements	Use Results to Determine Customer Services Required	Use Results to Determine Product Mix	Use Sales Forecast to Determine Store Size		Use Sales Analysis for Additional Information on Product Mix		Conduct Consumer Survey				
5.00	5.10	5.19	5.20	5.21	5.22	5.23	5.24	5.25	5.26	5.27	5.28			
Location Appraisal	Identify Return on Capital	Evaluate Free-Standing versus Shopping Centre Locations	Recognize All Cost Implications of Shopping Centre Location	Identify Responsibility for Leasehold Improvements		Obtain Legal Advice on Leases	Prepare One and Three Year Profit Forecast							
6.00	6.10	6.19	6.20	6.21	6.22	6.23	6.24	6.25						
Security	Develop Cash Register Procedures	Develop Cash Handling Policies, Procedures and Control	Develop Cheque Cashing and Authorising Procedures		Recognize Common Methods of Employee Pilfering	Develop Policy for Employee Purchases	Develop Policy for Employee's Personal Belongings	Develop Policy Regarding On-Premise Consumption	Provide Input to Internal Audit Procedures		Develop Procedures for Physical Emergencies	Monitor Receiving Procedures	Develop Ticketing Procedures for Price Marking	Develop Security Check List
7.00	7.10	7.19	7.20	7.21	7.22	7.23	7.24	7.25	7.26	7.27	7.28	7.29	7.30	7.31
Advertising & Promotion	Evaluate the Use of Advertising Display and Promotional Allowances		Communicate Advertising Plans and Schedules to Employees	Support Merchandising and Sales Plan in Advertising Plan	Merchandise the Advertising	Utilize Co-Operative Advertising		Develop Promotion Calendar	Utilize Bag Stuffers, Point of Purchase Item Demonstrations, Gift Items, Stuffers, Window Signs	Identify Techniques of Production and Sources of Supply of Promotional Items	Maintain Record of Results of Special Promotions	Utilize Special Events	Recognize Problems and Advantages of Catalogue Merchandising	Evaluate the Cost Effectiveness of Loss Leaders
8.00	8.10	8.19	8.20	8.21	8.22	8.23	8.24	8.25	8.26	8.27	8.28	8.29	8.30	8.31
Product Knowledge														
9.00														
Buying	Keep abreast of Product Developments and Market Trends	Identify Reliable Sources of Supply	Develop Source Relationships	Identify Products Compatible with Company Resources	Develop Specifications and Buy to Them	Use Independent Testing Laboratory	Use Sampling and or Product Testing	Use Buying Committee (Internal)	Use Private Labels	Use Buying and Shipping Groups (External)	Select Best Routing and Tariff Arrangement	Identify Adequate Facilities to Store Delivered Merchandise	Identify Various Means of Payment	Buy Under Government Quota Restrictions
10.00	10.10	10.19	10.20	10.21	10.22	10.23	10.24	10.25	10.26	10.27	10.28	10.29	10.30	10.31
Inventory Control	Take Physical Inventory													
11.00	11.10													
Distribution	Identify Different Pricing and Measurement Systems for Products													
12.00	12.10													
Accounting & Financial Management		Develop a Case and Presentation for Funding		Set Up a Simple Set of Books	Determine Services Available from Accountant		Determine Cost of Goods Sold	Maintain Record of Expenses	Develop and Maintain Petty Cash Records	Develop a Credit Sales Program	Develop a Company Collection Policy	Identify the Advantages and Disadvantages of Granting Credit		
13.00	13.10	13.19	13.20	13.21	13.22	13.23	13.24	13.25	13.26	13.27	13.28	13.29	13.30	
Personnel Administration	Identify Employee's Personal Objectives and Potential	Identify Performance Standards	Monitor On-Going Employee Performance	Carry Out Performance Evaluation	Analyze Performance Problems	Take Action Discipline and Counsel	Administer Discipline Policy		Develop Wage Administration Procedures	Work Within Labour and Human Rights Legislation	Work Within a Labour Agreement	Develop and Maintain Employee Records Files		Conduct Termination Interview
14.00	14.10	14.19	14.20	14.21	14.22	14.23	14.24	14.25	14.26	14.27	14.28	14.29	14.30	14.31
Communications	Use Audio-Visual Techniques		Give and Receive Instruction		Speak Publicly		Prepare Practice Reports	Write Practice Business Letters	Write Business Memo's	Follow-up on Requests and Memo's	Write Procedures	Identify Current Developments in Electronic Communication		Display Effective Reading Techniques
15.00	15.10	15.19	15.20	15.21	15.22	15.23	15.24	15.25	15.26	15.27	15.28	15.29	15.30	15.31
Law	Comply with Employment Law		Comply with Insurance Law		Comply with Law of Agency	Define Partnership	Define Corporations		Define Debt/Creditor Rights		Identify Personal Property Security	Identify Real Property		
16.00	16.10	16.19	16.20	16.21	16.22	16.23	16.24	16.25	16.26	16.27	16.28	16.29	16.30	
Data Processing		Explain Local and Remote Job Entry		Read Output Reports		Identify File Organization		Explain File Access and Security		Explain Searching Techniques		Define Computer Systems Management		
17.00	17.10	17.19	17.20	17.21	17.22	17.23	17.24	17.25	17.26	17.27	17.28	17.29		





